
Quick Reference Guide:

AIM Tips & Tricks

This guide will help districts to avoid the most common errors in entering and maintaining data in the AIM system and for reporting data to the state.

Topics covered in this Quick Reference Guide include:

- *Searching for students in AIM*
- *Creating and modifying enrollments*
- *Records transfers*
- *Creating households*
- *File uploads*
- *Special Ed and LEP*
- *Regular data checks*



This guide contains tips and tricks for districts to follow in an effort to maintain the best data quality possible and ensure that data is reported to the state in the most efficient and timely manner possible.



Before beginning, consider the following:

1. Why can't I find a student in AIM?

- Errors in spelling or gender can cause problems in searching for a student. The Search tab and not the Student Locator should be used to search for students currently enrolled in your district. *pages 2-3*

2. What are the best practices for creating or changing a student enrollment?

- This is where the Student Locator is used. Again, spelling and gender errors can cause problems. *pages 4-5*

3. How do I request records from another district in Montana?

- Both the Process Inbox and the Records Transfer tab are used to request and release student records. *page 6*

4. How do I create a household?

- To create a household it is necessary to have a student, an address, and at least one guardian. Once these are created the Census Wizard is used to assemble the household. *page 7*

5. What is the best way to upload a file into AIM?

- Files for demographics, enrollments, program participation, or other data must be in the correct format in order to be uploaded into AIM. *page 8*

6. How do I resolve problems with Special Ed or LEP data?

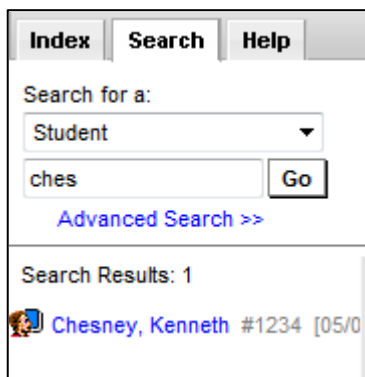
- Certain common errors occur when entering team members for special ed. or for designating a student as LEP. *page 9*

7. What should I do each day or each week to maintain the quality of my data?

- Certain data updates and checks should be run on a daily or weekly basis in order to keep student data accurate and up-to-date. *page 10*

Searching in AIM:

- It is not necessary to enter the student's entire name. Enter the first few characters of the last name and the search will find the student. This is useful if the full spelling of a name is unknown. It is possible to search on a first name by entering a comma and then the first name.
- DO NOT use the Student Locator to search for students who are **currently enrolled** in your district. The Student Locator is used to do a statewide search for students who may be currently or previously enrolled in **other** districts. Use the "Student" search on the search tab to find current students in your district.
- When searching under "Student" the search will only return students who have an enrollment in the year and school selected at the top of the screen. If the year is set to *All Years* it will search in all years and if school is set to *All Schools* it will search in all schools.
- When searching under "All People" the search will return anyone who has ever been entered in the system, including staff members and parents. "All People" will search in all years and all calendars, regardless of what is selected at the top of the screen.
- If a student does not come up when searching under "Student" try searching under "All People." It's possible that an enrollment was entered incorrectly and that is why the first search didn't work.



Index Search Help

Search for a:

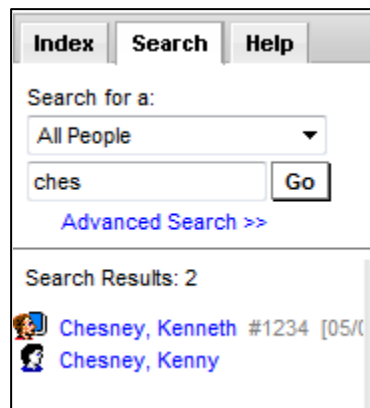
Student

ches Go

Advanced Search >>

Search Results: 1

Chesney, Kenneth #1234 [05/0]



Index Search Help

Search for a:

All People

ches Go

Advanced Search >>

Search Results: 2

Chesney, Kenneth #1234 [05/0]

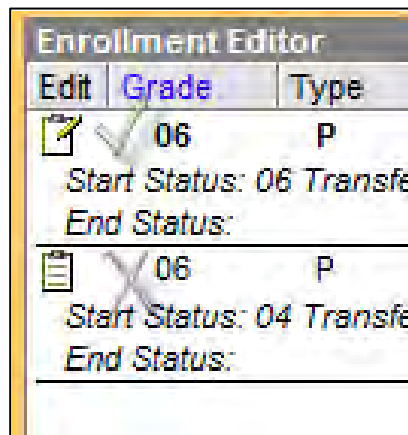
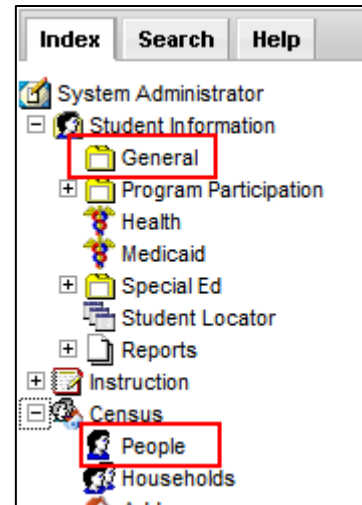
Chesney, Kenny

An "All People" search will find individuals that a "Student" search will not.

For more information see the [New User Guide](#).

Student Information vs. Census:

- Student Information->General will pull up a set of tabs related to a student's activities at your school. This area is primarily used for looking at enrollment data.
- Census->People will pull up a set of tabs giving demographic information about a person. This area is primarily used for updating a student's personal data.
- NOTE-In order to update a student's name, gender, or birthdate use Census->People. When a student's name changes it is best to create a new identity on the Identities tab. The identity with the most recent effective date is the one that will appear as the student's on-screen name. If a student has multiple identities, the student can be found by searching on any of the identities.

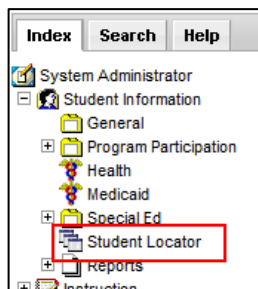


Enrollment vs. Enrollment History:

- These are two different things. An Enrollment shows that a student is enrolled in the district, either currently or in a previous year. The symbol for this is a clipboard with a pencil on it. An Enrollment History is a record of a student's enrollments in *other* districts. The symbol for this is a clipboard with little lines on it. A common mistake is clicking the New Enrollment History button instead of New when creating an enrollment. If this occurs the student will not be officially enrolled in your district, will not show up in a student search, and will not be reported to the state.

Entering new enrollments:

- Always select the correct year and school at the top of the screen before beginning the enrollment process. That way they won't have to be selected in mid-process which could result in a loss of data.
- Always use the Student Locator to search for a student who is transferring in to the district from another district in Montana or from out of state. The Student Locator will find any existing record for the student and will start the process of enrolling that student in the school. The Student Locator requires First Name, Last Name, and Gender for a search.
- NOTE–Searching in the Student Locator is different from searching on the Search tab. The Student Locator requires entry of the full name, spelled exactly as it was spelled in the student's previous district, otherwise it will not find the record. If the student was enrolled as Thomas Brady in his previous district and you search for Tom Brady, the locator will not find him. Occasionally, a previous district may have entered a student with the wrong gender. If a student cannot be found with the locator, try switching the gender.
- To manually enter a new enrollment for a returning student, do not use the Student Locator. Simply pull up the student's enrollment tab and click the New button. DO NOT click the New Enrollment History button.
- Start and End Dates–The start date of a student's enrollment is the first day he or she is attending class in the district, not the date the enrollment is created and not the date that records are received. Likewise, the end date is the last date the student attends class in the district, not the date the district is notified he or she is leaving and not the date on which records are released.



The Student Locator will only find a student name if it sounds similar enough to an existing name.

A screenshot of the 'Student Locator' search results. The title is 'Student Locator' and the section is 'Student Search'. Below the title, there is a text box with the instruction: 'Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to find a student. Select a student from the list or click on Create New Student. When doing a SSN-only search, the user must enter the SSN.' Below this, there are input fields for 'Last Name' (Gordon), 'First Name' (Jeff), and 'Gender' (M). To the right of these fields is a table with the following data:

Name	State ID	Gender	Birth Date	%
Gordon, Jeff	582057705	M	05/10/1996	100

A screenshot of the 'Student Locator' search results. The title is 'Student Locator' and the section is 'Student Search'. Below the title, there is a text box with the instruction: 'Search for a student already tracked in Campus using the fields provided. A minimum amount of data must be entered in order to find a student. Select a student from the list or click on Create New Student. When doing a SSN-only search, the user must enter the SSN.' Below this, there are input fields for 'Last Name' (Gordon), 'First Name' (Jeffrey), and 'Gender' (M). To the right of these fields is a table with the following data:

Name	State ID	Gender	Birth Date	%
No matches found				

For more information see the [New User Guide](#).

Service Types:

- Most students will get a “P” for primary enrollment. “S” is used if a student is enrolled primarily in another school (public, private, or home school) and is taking additional classes in your school. “N” is used for a student who is receiving only Special Ed services, such as speech, and is not taking any regular classes.

100: End of year, returning to same school next year
 105: Change in grade level during regular school year
 110: Promoted to another school in the same district
 120: Transfer to a public school in the same district
 130: Transfer to public schl under NCLB schl choice
 140: Transfer to public schl in another district in MT
 150: Transfer to a MT state-funded school
 160: Transfer to a private school in the state
 170: Transfer to a home school in the state
 180: Transfer to a school out of state
 190: Transfer out of the country
 210: Medical care or treatment, eligible to return
 220: Enrolled in a foreign exchange program
 230: Enrolled in an early admissions college program
 240: Withdrawn, under age for compulsory school att
 250: Expelled, eligible to return
 260: Unknown (grades PK-6)
 295: Dropped out, subsequent re-enrollment
 300: Withdrew for personal or academic reasons
 310: Exceeded age requirement set by district policy
 320: Removed or Expelled, without option to return
 330: Withdrew to enroll in non-diploma program
 340: Unknown
 400: Graduated

End Status codes:

- If a student who previously dropped out has now returned, use code 295. This code is only used retroactively. That is, if a student was marked with one of the dropout codes for the end of his or her last enrollment and unexpectedly comes back to school within the same school year or prior to the next Fall count date, go back to the last enrollment and change the dropout code to a 295. If this is not done the student will count against the district as a dropout.

Grade Level Changes:

- If a student is promoted to a higher grade (or demoted to a lower grade) during the course of a school year **always** end the student’s current enrollment with an end code of 105 (Change in grade level during regular school year) and create a new enrollment with the new grade and a start code of 02 (Continued enrollment, no interruption). **DO NOT** go in to the student’s current enrollment and change the grade level. Doing so will erase any record of what grade the student began the year in and this can cause problems for ANB calculations later on.

Enrollment Editor					
Edit	Grade	Type	Calendar	Start Date	End Date
	08	P	13-14 Cascade 7-8	01/06/2014	
Start Status: 02 Continued enrollment same school, no interruption					
End Status:					
	07	P	13-14 Cascade 7-8	08/29/2013	12/20/2013
Start Status: 04 Transfer from public school in district or state					
End Status: 105 Change in grade level during regular school year					

For more information see the [Entry Scenarios](#) and [Exit Scenarios](#) reference guides.

Records transfers:

- When a student transfers in to the district from another district in Montana the AIM administrator can request an electronic transfer of records from the student's previous district. When using the Student Locator the Student Records Transfer page will appear automatically after creating an enrollment. Simply click on Submit Request to initiate the request.
- If a student who was previously enrolled in your district returns the Student Locator will not automatically take you to the Records Transfer page. In this case pull up the student's general information and go to the Records Transfer tab. Click New State Transfer Request, then Submit Request.
- NOTE-The records transfer tool will only request records from a student's last district of enrollment, not from every district the student has ever been enrolled in.
- When an incoming student's records have been released to you a blue message which reads "Transfer Released" will appear in the process inbox. Click that link and you will be taken to the Student Records Transfer page. On the lower right, under Data Imports, click on one of the available records and then click either Save or Next to download the record. It is especially important to download any Special Ed or LEP records that have transferred. **NOTE:** Only a locked IEP will transfer electronically. Be sure all IEPs are locked before releasing records.
- When another Montana district sends a request for student records a message will appear in the Process Inbox which reads "Request for you to Release:" Click on this message and then choose to release, reject, or ignore the request.

Aguilera, Christina
Grade:11 DOB:04/25/1999 Gender:F

Summary Enrollments Schedule Attendance Flags Grades Transcript Credit Summary
Assessment Behavior Graduation AdHoc Letters **Records Transfer**

New State Transfer Request

Request Date	Name	Status	Requesting District	Releasing District

Records Transfer Aguilera, Christina #
Use this tool to request the release of a transfer student's records. The following information will be sent to the student's former district and they will be given the opportunity to release their records. Only an exact student match can yield a release, so it is a good idea to call the district to confirm this student was enrolled there and to let them know to expect a release request.

Student: Enrollment Type: Primary

Last Name	Aguilera	First Name	Christina	Middle Name	
Gender	F	Birthdate	04/25/1999	SSN	
Grade	11	School	13-14 Cascade High School	Start Date	08/28/2013

Requesting District & User

District	0280 Cascade Public Schools	Name	System Administrator	Username	support
Request Date	04/29/2014	Work Phone		Email	

Comments

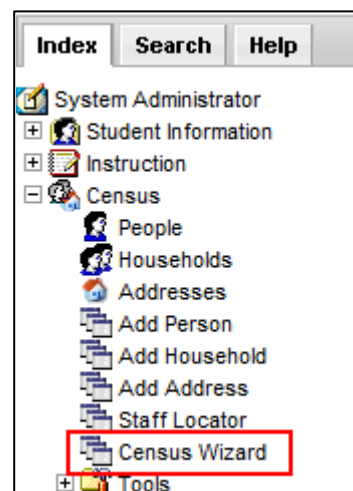
[Transfer Released: Knievel, Evel 419339261](#)

[Request for you to release: Knievel, Evel 419339261](#)

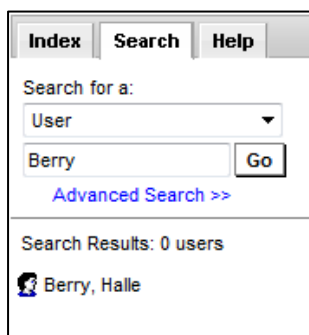
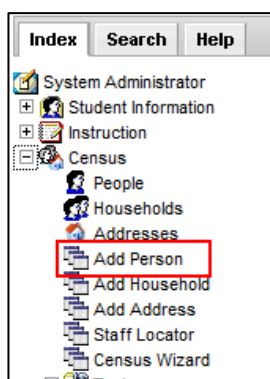
For more information see the [Records Transfer](#) reference guide.

Creating a Household:

- In order to create a household three essential ingredients are required: 1. A student 2. At least one guardian 3. An address. The student should already be enrolled in the system. Use Census->Add Person to create the guardian(s). Use Census->Add Address to create the address.
- When all of the above have been entered, use Census->Census Wizard to link them together into a household. Search for the relevant people and address and click on each to add it to the Household box. Move to Step 2. Enter a telephone number and household start dates. Move to Step 3. Pick the set of names under Relationship to (student) and choose the correct relationships. The Guardian and Mailing boxes should be checked for each guardian. If a person in the household is not a guardian, do not check these boxes.



For more information see the [Creating Households](#) reference guide.



For more information see the [Creating & Modifying Users](#) reference guide.

Adding new staff:

- To add a new staff member go to Census->Add Person. After adding the person add the correct information on the District Employment and District Assignment tabs. It is important to have the correct role boxes checked on the District Assignment record, especially for SPED staff. If a staff member does not have the Special Ed box checked then he or she cannot be added as a team member for a student.
- NOTE—If a staff member will be working with students at more than one school in the district, that member will need to have a separate district assignment created for each school.
- A person is set up as a user in AIM by searching for the person under User and then selecting a username, password, and user group rights. It is recommended that only the primary AIM administrator and an AIM backup person have full administrative rights in the AIM system. Special education staff, counsellors, and teachers should not be given full tool rights.
- For TEAMS reporting purposes, a teacher's State Staff ID in AIM should be set to their SEID (Folio) ID number.

File uploads:

- If all students have already been entered in the local SIS create file uploads for demographics and enrollments and upload these files into AIM.
- ALWAYS upload the Demographics file first and the Enrollments file second. Any other file uploads—program data, attendance, LEP etc.—come after these first two uploads.
- DO NOT use the Load Complete File option when uploading a file as this can result in an accidental deletion of data in AIM. Always choose Load Partial File.
- Go to MT State Reporting->MT Data Upload to start the process. Select the file type, choose Validate and Test, and browse for the correct file. ALWAYS validate and test the file before doing the actual upload. This will help prevent the accidental uploading of incorrect data. ALWAYS review your results after uploading a file. The results file will alert you to any errors which occurred in the upload.
- To enter student data into a blank Excel template for upload into AIM there are several important steps to note. Many numerical fields in the file need to be of a certain length, four digits for district and school code, two digits for grade code etc. The data in Excel will need to be formatted with necessary zeroes in front of the number (zero padding) before saving the file.
- An Excel file must be saved as a .txt file in order to be uploaded into AIM. This conversion will enter a series of blank tabs after the header row. These will need to be deleted from behind the last character of the header row before saving and uploading.

This an example of the enrollments template. The template contains information on how to correctly format all fields.

A	B	C	D	E	F	G	H	I	J	K
DELETE rows 1, 2, and 3 prior to saving as a text(tab delimited) file - enter the Header Row into the text file.										
Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9	Field 10	Field 11
Record Type (EN)	District Number	School Number	Calendar Number	Student's State ID	Student's Local ID	Last Name	First Name	Service Type (P,S,N)	Start Date (MM/DD/YYYY)	Start Status

For blank file templates see [OPI File Specifications](#).

Tips for Special Ed:

For AIM Administrators:

- A staff member must be listed as a team member for a student in order for that student to show up in the staff member's caseload.
- A staff member must have the Special Ed box checked on their district assignment in order for them to be added as a team member for a student.
- A student is considered to be Special Ed for state reporting purposes ONLY if the student has a LOCKED IEP. Simply marking a student as Special Ed on the enrollment tab is not sufficient.

For Special Ed Staff:

- When creating the Evaluation Report make sure that the "not eligible" box is not checked and that at least one disability is marked. Once the report is signed by a guardian it needs to be locked.
- When creating an IEP make sure to complete the State Reported Data editor. In this editor it is the TOTAL instructional minutes per day that you are calculating. After the IEP meeting is held and the IEP is signed by a guardian it needs to be locked (including all amendments).
- Do not try to change the dates on the first screen of the Amendment Options. Instead, add an Amendment Reason and save in order to proceed. After all changes have been completed change the start date by selecting the Review Amendments icon on the upper right of the screen.
- If a person is no longer a case manager or other team member he or she should be end dated on the Team Members tab.
- For additional questions please contact OPI Special Ed problem solver Mary Graff at 444-0685.

The screenshot shows the 'Employment Assignment Information' form. It includes fields for School (Cascade School), Department, Start Date (08/01/2013), End Date, Title, Type, FTE of Assignment, and Assignment Code. Below these are several checkboxes for roles: Teacher, Special Ed (highlighted with a red box), Program, Behavior Admin, Health, Advisor, Supervisor, Counselor, Foodservice, Exclude Behavior Referral, Self Service Approver, and FRAM Processor.

Tips for LEP:

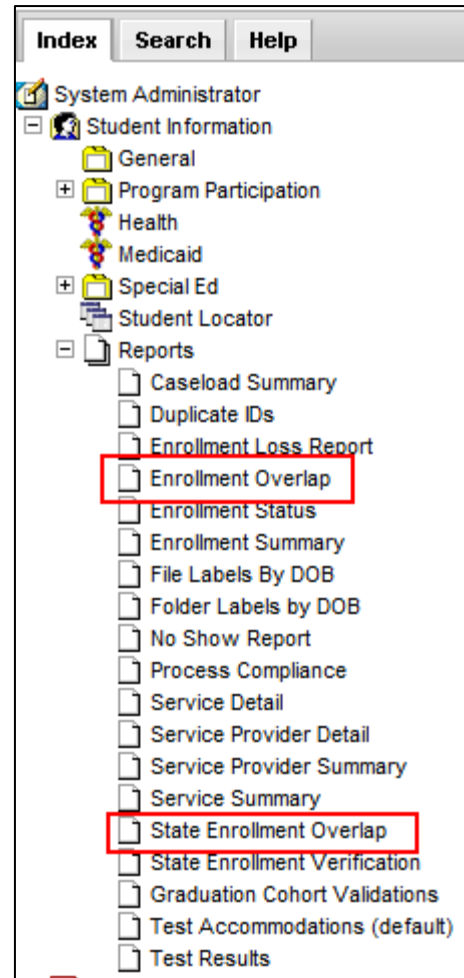
- To enter a student as LEP first enter the student's Home Primary Language and Language of impact on the Demographics tab. If these are not entered first the LEP tool will not allow further action.

The screenshot shows the 'Demographics' tab form. It includes fields for Date Entered US, Date Entered US School, Date Entered State School, Home Primary Language (highlighted with a red box), Language of Impact (highlighted with a red box), and Nickname.

For more information see the [LEP Tool Guide](#).

Routine Data Checks:

- Districts are encouraged to run certain data processes and checks on a regular basis. For instance, enrollments in AIM should be updated within 24 hours when a student transfers into or out of the district or undergoes a change in grade level or service type.
- The AIM administrator for the district (or for the school) should check the Process Inbox on a daily basis in order to remain aware of transfer requests from other districts.
- Districts should run enrollment overlap reports on a weekly basis. These reports are found under Student Information>Reports and include both the Enrollment Overlap and State Enrollment Overlap reports. Note that if a student appears on the State Enrollment Overlap report the error is likely due to an incorrect start or end date on the part of the home district or of another district. These reports should also be run anytime an enrollment file is uploaded into AIM.
- If a student has not been in attendance in the district for more than two weeks the student may have moved to another district without giving notice. Running the State Enrollment Overlap Report will quickly verify whether or not this is the case.

A screenshot of the 'State Graduation Record' form in the AIM system. The form is titled 'State Graduation Record' and has a message: 'No state graduation record found for this student.' Below this, there are sections for 'Enrollment Data: Lodge Grass Public Schls (0218)' and 'Graduation Detail: Lodge Grass Public Schls (0218)'. The 'General Graduation Information' section contains fields for 'Diploma Date', 'Diploma Type', 'Diploma Period', 'Date First Entered the 9th Grade' (set to 08/23/2012), 'NGA Cohort End Year' (set to 2016), 'NCLB Cohort End Year' (set to 2016), 'Post Grad Location', and 'Post Grad Plans'. At the bottom, there is a 'State Reporting Graduation Fields' section with a 'Cohort Grad Year' field.

Graduation Tab:

- A student should only have diploma information entered on this tab when the student graduates as a high school senior. Even if the district gives out diplomas to students who complete the 6th or 8th grade, only use the Graduation tab for graduating high school seniors. Fill in the Diploma Date, Diploma Type, and Diploma Period. The Date First Entered 9th Grade is calculated automatically. The other fields can be disregarded.

For more information see the [Graduate Cohort and Dropout Verification](#) guide.

INDEX OF AIM REFERENCE GUIDES

For searching for students and setting up new enrollments: [New User Guide](#)

For detailed scenarios on how to enter and exit students and which codes should be used: [Entry Scenarios](#) and [Exit Scenarios](#)

For creating households: [Creating Households](#)

For adding new staff members and AIM users: [Creating & Modifying Users](#)

For reporting students in Job Corps or Montana Youth Challenge: [MT Programs](#)

For setting up LEP students: [LEP Tool Guide](#)

For setting up FRAM eligibilities: [FRAM File Upload](#)

For reporting graduates and dropouts: [Graduate Cohort and Dropout Verification](#)

Link to ePass site: [ePass Montana](#)

Link to OPI Securities Policies video: [OPI Security Policies](#)

OPI STAFF DIRECTORY

MAIN OPI WEBSITE:

www.opi.mt.gov

AIM HELP DESK:

1-877-424-6681 (toll free)

406-444-3800

opiaimhelp@mt.gov

AIM STAFF:

QUESTION	SPECIALIST
General AIM Questions	Mike Gamble and Jim Oberembt
Special Education	Mary Graff
Graduates and Dropouts	Andy Boehm

TEAMS:

TEAMS Help Line – 444-9444 OPITEAMS@mt.gov

OTHER OPI STAFF:

If you have questions regarding a specific program these individuals will be best suited to help you:

PROGRAM	SPECIALIST	PHONE	EMAIL
CTE Data	Diana Fiedler	444-9019	dfiedler@mt.gov
Smarter Balanced Assessment	Ashley Makowski	444-3511	amakowski@mt.gov
21 st Century Program	Amanda Domino	444-1964	adomino@mt.gov
TEAMS, School Staffing	Danielle Murphy	444-1625	dmurphy@mt.gov
Title I	Jack O'Connor	444-3083	joconnor2@mt.gov
Homeless and Title I D Neglected and Delinquent	Heather Denny	444-2036	hdenny@mt.gov
LEP (Limited English Proficient)	Eric Meredith	444-3642	emeredith@mt.gov